



**United Way**  
Calgary and Area

“Fundraising is the gentle art of persuading people to experience the joy of giving.”

**Hank Rosso, The Fundraising School Founder, Indiana University**

# CANVASSER MANUAL

## A CANVASSER:

- > Believes and supports United Way
- > Is a resource to ensure coworkers are informed, have the OPPORTUNITY to give and the comfort level needed to make a decision about their charitable giving.
- > Rallies support for his/her workplace campaign by encouraging coworkers to attend events, participate in activities, and support the campaign.
- > Believes and explains what United Way does to support the community.
- > Answers questions about United Way.
- > Promptly collects and turns in pledge cards of contributors and non-contributors/explains and assists in navigating through the UW@Work.
- > Thanks everyone who supports Campaign.

United Way Canvassers launch the campaign by making their donation first!

Thank you <sup>for being a</sup>  
**Canvasser**

The most effective method of fundraising is face-to-face, one-on-one canvassing. Canvassers should attend a United Way Canvasser Orientation to ensure they clearly understand their responsibilities and the importance of their role.

### **Before you begin to Canvass ensure to take time to:**

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- > Learn about United Way in order to answer basic questions and have the appropriate material.
- > Review and become familiar with the information about your campaign.
- > Consider your own personal reasons for giving and make your donation first. You will find it much easier to introduce and explain the pledge process if you have already made your own gift.
- > Set up a meeting time and ensure you are not interrupting someone at an inconvenient time. Respect other people's priorities.
- > Be as considerate as possible.

### **Find out about your own employee campaign:**

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- > When are the campaign kick-off/wrap-up and other key dates?
- > Are there any draws or incentives?
- > Are there any special events scheduled?
- > What is this year's employee campaign goal?
- > How much money was raised last year?
- > When will the first deduction from the pay cheques occur?
- > How many donations will be made?

### **Once you have familiarized yourself with the employee campaign follow these seven basic steps to successful canvassing:**

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- Step 1:** Introduce yourself as a **Volunteer** with your company United Way Campaign
- Step 2:** Engage them with a question – Have you seen our schedule of events?
- Step 3:** Ask if they have any questions.
- Step 4:** Offer your own reasons for supporting United Way
- Step 5:** Invite them to give
- Step 6:** Thank everyone for considering, whether they give or not.
- Step 7:** Follow-up. Get back to them with answers, materials etc.

## **STEP 1:**

### **Introduce yourself as a Volunteer with your company United Way Campaign**

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- > Canvassers DO NOT pressure donors to give
- > Set the tone be honest and open
- > Canvassers participate because they want to and believe in the United Way's work
- > By introducing yourself as a Volunteer peers will be more likely to listen

## **STEP 2:**

### **Engage them with a question**

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- > By engaging with a question you are opening the conversation up to two way dialogue
- > Did you get the online Link? Have you seen are our schedule of events?
- > Outline/Highlight the key facts about your campaign, i.e. past achievements, this year's goal, events, etc.

## STEP 3:

### **Ask if they have any questions**

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- > Questions and concerns can be opportunities to inform and provide facts
- > Listen carefully to any concerns, and answer questions to the best of your ability. (The most common concerns and the suggested responses are provided for you in United Way's Frequently Asked Questions located in the back section of this guide.)
- > If you are unable to answer a question, make a note of it and tell your coworker you will get back to them with an answer. Then contact your ECC or United Way contact to obtain a satisfactory response.

## STEP 4:

### **Offer your own reasons for supporting United Way**

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- > Identify a compelling fact or message about United Way's impact on the community, which has meaning for you and helps to explain United Way
- > Explain your personal reasons for supporting United Way

## STEP 5:

### **Invite them to give**

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- > I hope that you will join me in supporting our community by giving to United Way
- > Introduce and discuss giving options (Pledge Card/UW@Work)
- > Explain the personalized pledge form
- > Highlight the impact of giving and the benefits of payroll giving
  - o Payroll giving: annual donation can be spread over pay periods, donations are recorded on T4 slips, and it can be easier on your budget to manage small gifts throughout the year
- > Let people know you are hoping for a timely response and establish a date for follow-up

## STEP 6:

### **Thank Everyone for considering- whether they give or not**

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- > It is not just about the money; it is also about building awareness
- > Thank people for their time and contribution
- > You may choose to send a thank you note, email or leave a voice mail as well
- > The impression you leave is the one that people will remember when they think of United Way

## STEP 7:

### **Follow Up. Get back to them with answers, materials ect.**

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- > Follow-up on outstanding pledge cards
- > Follow-up on any questions that you were not able to immediately answer
- > Return all pledge cards, cash and cheques to your ECC or designated company contact within the time frame of your campaign



# ABOUT UNITED WAY – FREQUENTLY ASKED QUESTIONS

## **What does United Way of Calgary and Area do?**

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United Way of Calgary and Area is in the community impact business. It funds agency programs and collaborations while engaging volunteers, business, government and others to identify the most serious human service issues in our community and to determine the best way to address them. This is why United Way works to tackle the underlying causes of social issues to help make our city great for everyone.

We are accountable and responsible stewards of these investments in our community. We work hard to ensure our efforts generate results that you can see.

## **What are United Way's goals?**

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United Way of Calgary and Area believes that there are three essentials that will make Calgary a great city for everyone:

- Children and youth have the chance to be all that they can be
- Families and individuals can achieve financial stability so they can move from poverty to possibility
- Communities are healthy and strengthened so that everyone has a better life

## **Why should I donate to United Way of Calgary and Area?**

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- When you invest in your community through United Way you can trust that your dollars are being strategically invested where they are needed most.
- United Way brings together all areas of community – business, government, academia, school boards and others – to address social issues at the root cause level and develop effective, long-term strategies.
- United Way's Community Investments and Collaborations team adds tremendous value to your donation. They develop a highly targeted investment strategy based on in-depth knowledge of social issues, extensive research, awareness of community need and an ability to identify, address and alleviate existing gaps.
- United Way measures outcomes in its investment areas and reports these back to donors. We have rigorous standards of excellence for performance and report outcomes annually.
- United Way brings lasting value to agency partners. We make multi-year funding commitments, collectively design long-term strategies for program delivery and share research. We also provide assistance to improve governance and administration practices when needed.

## **What does my donation support?**

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- Strategic partnerships that implement long-term, sustainable solutions for Calgary's complex social issues.
- A network of effective agency programs and services supported and held accountable by United Way.
- Bringing together partners from all sectors to identify the best solutions to the root causes of social issues.

## **What is the difference between United Way of Calgary and Area and United Way of Canada – Centraide? Are they independent or one large organization?**

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Each of Canada's 117 United Way–Centraides are autonomous, operated by a voluntary Board of Directors within the communities they serve. The organizations work locally to address prevalent social issues and improve living conditions and quality of life within their specific area.

While the issues each United Way face may vary, the vision that drives them is the same: To improve lives and build community by engaging individuals and mobilizing collective action.

## **What is United Way of Calgary and Area's geographic scope?**

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United Way serves Calgary and partners with Cochrane, High River, Okotoks, Strathmore and Chestermere to identify their regional needs and invest in local programs and initiatives. By forming local, volunteer-led partnership committees, United Way ensures funds are invested where they are needed most in the community. While Airdrie does not have a direct partnership with United Way of Calgary and Area, we have funded agency programs within that community for many years.

## **Why is United Way involved in advocacy work?**

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While the majority of our work is partnering with many organizations to address immediate needs and to get at the underlying cause of social issues to prevent them from happening in the first place, we have also learned that there are some barriers in municipal, provincial and federal social policy. By advocating change around these social policies, we can make a more significant impact in our community.

## **Does United Way collaborate with other organizations?**

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Yes, many. We know it takes many individuals and organizations working together to address complex social issues. United Way works with individuals, human service agencies, schools, labour, business, ethno-cultural communities, academia, government and communities of faith to promote awareness of key social issues in our community, maximize resources and find lasting solutions to these complex issues.

# **ABOUT FUNDRAISING, ADMINISTRATION COSTS AND FINANCIAL ACCOUNTABILITY**

## **How much of my donation does United Way of Calgary and Area use for fundraising and administration costs?**

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Fundraising and related administration costs for 2010 were 11 percent of the total funds raised. This is among the lowest costs of fundraising for registered charities in Canada. By comparison, the Canada Revenue Agency (CRA) considers 35 percent to be an acceptable standard. Our 2011 annual campaign costs are expected to be in the similar range to previous years - around 11 percent.

As a registered Canadian charity, United Way is obliged to file a T3010 report with CRA annually, detailing all of its fundraising, administration, executive compensation and other costs. The latest CRA T3010 data can be found at [www.cra-arc.gc.ca](http://www.cra-arc.gc.ca)

Every dollar donated and every dollar spent is accounted for in our independently audited financial statements contained in our annual report. Please visit [www.calgaryunitedway.org](http://www.calgaryunitedway.org) for more information about community investment and administration costs.

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### **How does United Way keep its costs so low?**

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**United Way's costs remain low for many reasons, such as:**

- The contributions of over 11,000 highly-skilled volunteers.
- Our ability to maximize efficiencies and implement economies of scale that smaller organizations cannot.
- Our ability to leverage our 70 year proven history, strong reputation and high profile to receive pro-bono and discounted rates on some services, such as advertising and associated collateral.

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### **How is United Way of Calgary Area's transparency & fiscal accountability monitored?**

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**In many ways:**

- Management, staff and volunteer vigilance to maximize community impact with donated dollars.
- Our volunteer **Board of Directors** conduct regular, in-depth reviews of United Way's financial and community investment performance.
- United Way of Calgary and Area, as a part of United Way Canada-Centraide, is a flagship member of Imagine Canada's Ethical Fundraising and Financial Accountability Code. In addition, we continue to follow internal Transparency, Accountability and Financial Reporting (TAFR) guidelines which are intended to be defensible, acceptable, consistent, transparent and simple in providing standardized reporting by United Ways across Canada.
- The accounting firm Deloitte & Touche LLP ensures that our financial statements are accurate and we operate in a fiscally responsible manner. Please visit [http://www.calgaryunitedway.org/main/who\\_we\\_are/accountability](http://www.calgaryunitedway.org/main/who_we_are/accountability) to read our annual report, including our independently audited financial statements.
- United Way of Calgary and Area's annual T3010 filing with Canada Revenue Agency with all required financial and other disclosures can be found on the CRA website [www.cra-arc.gc.ca/](http://www.cra-arc.gc.ca/)

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### **Is United Way a professional fundraiser?**

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No. United Way is not a professional fundraiser and does not take a percentage of donations as profit.

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### **Does United Way use paid fundraising organizations?**

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No. Thanks to our staff and volunteers we are able to conduct our fundraising efforts with internal resources. All costs attributed to fundraising are included in the 11 percent.

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### **Does United Way fund any agencies that use paid fundraising organizations?**

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Some agencies that receive United Way funding may find it necessary to use the services of a professional fundraising organization - usually associated with its own national organization fundraising campaigns.

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### **Are United Way events paid for with donor dollars?**

No. Every United Way event is sponsored by corporations or individuals who generously offer to cover the costs. Sponsorship may be in the form of in-kind products or services or straight cash. Every event and its associated sponsor(s) is listed on our website:

[www.calgaryunitedway.org/main/what\\_you\\_can\\_do/sponsorship](http://www.calgaryunitedway.org/main/what_you_can_do/sponsorship)

## **How much are United Way's senior executives paid?**

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All salaries at United Way of Calgary and Area, including senior management, are benchmarked against other Canadian non-profit organizations of similar size and scope in Calgary and among other United Ways throughout Canada.

In Calgary, United Way participates in an annual not-for-profit survey comparing all salary levels and job descriptions in the social services sector so that salaries remain reasonable and fair in comparison with others in the non-profit industry.

United Way of Calgary and Area is in compliance with the required T3010 regulatory reporting to Canada Revenue Agency for its executive compensation, which can be viewed at [www.cra-arc.gc.ca](http://www.cra-arc.gc.ca)

I heard a rumour the President of United Way uses a private jet.

When Ruth Ramsden-Wood, the President of United Way of Calgary and Area, travels by air, it is the same as all United Way staff – via the lowest available economy airfare on a commercial air carrier. She also drives her own mid-size family vehicle.

# ABOUT OUR ANNUAL CAMPAIGN

## **How much money did United Way raise last year? Where does the funding come from?**

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United Way of Calgary and Area raised \$51.7 million in the 2010 campaign. Funding came from generous individuals in the community and workplace employees, corporate donations, and other sources including events.

## **What is needed for a successful campaign?**

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We need to engage people's hearts, minds and hands to help make Calgary a truly great city for everyone. Each of us can make a difference by volunteering, by giving back to the community financially, by learning about social issues, and by speaking up.

## **What is The Tomorrow Fund?**

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The Tomorrow Fund is United Way of Calgary and Area's community-wide endowment fund. Donations to the fund are permanently invested, with a portion of the interest used to help United Way sustain long-term work and give thousands of people hope for a better life. Thanks to generous donors, The Tomorrow Fund has grown to \$20 million since 1990.

## **What is Leadership Giving?**

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Among the most influential people to affect change in Calgary are the generous donors who contribute at the Leadership level. Through an annual gift of \$1,000 or more, these individuals and families set the pace for community building in Calgary. We are pleased to recognize Leaders and Major Donors (people who give \$10,000 or more) in published materials.

## How does United Way protect donors' privacy?

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United Way is committed to protecting the privacy and confidentiality of your personal information. The information you provide us will be used to assist in the proper administration and acknowledgement of your gift, to issue tax receipts and to fulfill your information requests. We do not sell donor information, nor do we share donor information with other agencies, unless donors ask us to do so. We protect information through secure computer systems and document handling.

## What is Spirits of Gold?

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The Spirits of Gold Recognition Awards recognize outstanding leadership and commitment to our community and to the United Way campaign. More than 18 awards are presented each year, including the Award of Excellence, Outstanding Agency Volunteer Award and the First Time Employee Campaign Award.

## Why do you charge \$12 for processing each Donor Choice designated gift?

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Donor Choice is an added service that United Way offers to our donors. United Way's core business is about making a measurable difference by focusing on our community priorities. The time and resources devoted to processing Donor Choice designations are costly and take us away from dedicating time to support our core business. The \$12 processing fee offsets the administration cost and ensures that we can continue to meet the needs in our community.

## I feel pressured to give. Does United Way condone this?

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No one should feel pressured to give, but everyone should be given the opportunity to make an informed choice. United Way works because so many people contribute voluntarily and know United Way creates added value to their gift. Our staff, community and workplace volunteers are trained to provide factual information and real examples of where, who and how change can happen with your help.

# ABOUT OUR INVESTMENT IN THE COMMUNITY

<http://www.calgaryunitedway.org/main/>

## Where does United Way focus its community investments?

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Three key areas:

### **1. All That Kids Can Be:** Helping children and youth achieve their potential

To succeed in school and in life children need nurturing, early literacy development opportunities, positive role models and an education – at least grade 12. United Way of Calgary and Area supports development, educational and after-school programs that give children and youth the self-esteem and confidence they need to become engaged and productive adults.

**Click here** for a detailed breakdown of specific program funding distribution.

## **2. From Poverty to Possibility:** Promoting financial stability and independence

Poverty is a complex issue. Once in the cycle of poverty, it is extremely difficult for individuals and families to overcome; and can continue for generations.

United Way invests in numerous high quality, high impact programs to support individuals to have access to the basic needs and other resources to help them stabilize and also the opportunity acquire the knowledge and tools to maximize their income and increase their savings and long-term stability. United Way of Calgary and Area supports money management, financial counseling and matched savings programs to help Calgarians avoid or escape the cycle of poverty.

**Click here** for a detailed breakdown of specific program funding distribution.

## **3. Healthy People, Strong Communities:** Improving neighbourhood health and personal well-being

Individual and family health and well-being is influenced by where people live. The strength, resilience and health of neighbourhoods has a major impact on the well-being of residents and their current and future quality of life. United Way of Calgary and Area supports recreation, parenting, social and human services programs that provide the tools, confidence and support people need to create vital communities.

**Click here** for a detailed breakdown of specific program funding distribution.

## **How are investment decisions made?**

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As part of our stewardship of donor dollars, we have a rigorous process in place to ensure the best investment of resources. Experienced staff and volunteers make investment decisions based on community needs, research and funding criteria. We invest to minimize duplication among programs and look for measurable results, quality performance and innovative approaches.

## **What is a Day of Caring®?**

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The Day of Caring® program enables workplace employees and other groups to spend time on community projects. Projects could include serving breakfast to a group of seniors, gardening outside an agency, or building a park for children with disabilities. A Day of Caring® promotes a deeper understanding of community problems, provides an excellent team-building opportunity and makes a visible impact in our community. Last year, more than 2,000 people volunteered at Day of Caring®.

## **Does United Way fund religious or political projects?**

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No. While we do support some programs in agencies with religious roots, our funding goes only to programs that are open and accessible to ALL members of the community and do not promote religion to participants.

## **Does United Way fund abortions?**

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No. United Way does not fund abortions or any other medical procedure. United Way funds educational programs that deal with human sexuality. These programs are aimed at reducing the incidence of unplanned pregnancies and the spread of sexually transmitted diseases.

## **Does United Way fund the John Howard Society?**

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United Way supports rehabilitation programs for a variety of agencies, but it does NOT fund adult group homes or halfway houses. We believe in helping people get back on their feet and reintegrating into society. United Way supports the John Howard Society by funding the following:

- Learning employment enhancement program and emergency assistance
- Transitional program for homeless youth
- Transitional residence for youth
- Youth advocacy and mediation services
- Institutional visitation program

## **Does United Way ever discontinue funding to an agency or program?**

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Yes. Some programs are designed as 'pilots' specifically funded or planned for a pre-determined duration.

There are also agencies that we reduce or discontinue funding for other reasons. In most years, our agency review process identifies the need to consider a phased reduction or cessation of United Way funding to one or more of our 100+ funded agencies. The reasons vary. It may be the agency has governance issues, outcome measurement shortfall or simply no longer requires United Way funding due to government or other funding sources meeting its financial needs. United Way has an evolving community investment strategy that requires agency community impact plan alignment. Before de-funding an agency, United Way engages in much discussion to either remedy any performance or accountability issues, implement efficiency building strategies or engage United Way volunteers to assist with governance, financial management or program delivery assistance. Discontinuance of agency funding from United Way is usually a phased, collaborative process.

# ABOUT SOME OF OUR INITIATIVES

## **What is 211?**

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211 is a telephone information and referral service supported by United Way of Calgary and Area, the Distress Centre and The City of Calgary. By dialing 2-1-1, callers can receive free, confidential and multilingual information on a full range of community, social, health and government services in Calgary, 24 hours a day, seven days a week. The service contributes to helping people access the community and social services they need.

United Way is a very active participant in a collective effort to expand 2-1-1 province-wide.

## **What is UpStart?**

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UpStart: Champions for Children and Youth, is an initiative directed by community leaders. UpStart's goal is to ensure that all kids have a chance to grow up great. It was started by United Way in 1998 and continues to have significant support from the organization. Upstart's Council of Champions brings together leaders from a wide variety of sectors to work on priority issues around children – access to recreation, workplace on-site childcare and support for parents.

## What is BeCause?

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BeCause is a group of young professionals who work together to engage their peers in understanding social issues and actively creating positive change. Calgary has the youngest population in Canada, and is a unique, entrepreneurial city where the potential of young philanthropists can be leveraged. BeCause works to inspire community involvement in new and creative ways, and to educate young Calgarians to understand and care about social issues through Volunteerism, Charitable Giving and Civic Engagement.

**[www.BeCause.ca](http://www.BeCause.ca)**